

CEO Onboarding: How the Leadership Team and Board Can Help

Paul Bohne

When a new CEO or other top executive is hired, there is a natural tendency for the leaders of an organization to exhale, relax and coast a little, knowing that help is on the way. This is understandable, given that hiring for such a key position is a comprehensive and even exhausting process.

Yet the work of acclimating the new CEO is just beginning. Installing a new CEO is a little bit like an organ transplant—the new organ and the body need time to get conditioned to each other. The right organ match is critical yet as important are steps conditioning the body. There may be good days and bad before the body is functioning optimally.

The Leadership Team: Supporting the New Leader

What follows are suggestions for leadership teams to play a central role in onboarding the new leader. (And below are additional tips for boards.) While this advice is geared toward CEO transitions, it can also apply to other leadership hires. In addition, while onboarding is most often thought of in the context of CEOs who are external hires, [internally promoted CEOs](#) can use proactive team and board support as well.

1. Develop a plan, then implement it.

There are countless types of onboarding plans used in business today—providing background on the new organization, organizing meetings with key stakeholders, outlining goals for the short term. The

exact format doesn't matter as much as the actual follow-through, and with recognizing your work begins literally the moment someone accepts an offer.

What steps you take from when someone accepts to before they begin are both tone-setting and significant in demonstrating early supports. Identify the best champions who are the formal and informal leaders, provide them a clear charge and monitor and evaluate the follow through on that charge. For a new CEO, the Board Chair should assume ownership of the plan, in partnership with the CEO. Whether it is with the support of a coach or onboarding champion, the organization's leaders must have the stick-to-itiveness to make sure the plan is carried out to realize its full benefits.

2. Recognize and manage your own vulnerabilities.

Let's face it, a new CEO or top leader triggers a sense of unease and anxiety and can produce feelings of self-preservation among the leadership team. (Executives in this situation would do well to read [Harvard Business Review's](#) classic article, "[Surviving Your New CEO](#)".) It's perfectly normal to have these feelings—tap into them and own them, but don't let them inhibit your embrace of the new executive. Vulnerability, especially when it's manifested in groups, can translate into intentional or unintentional undermining of a new CEO or executive. Understand your fears, but don't let them color your relationship with the new leader.

3. Lean in with support.

Rather than sit back and wait for the new CEO to ask for your help, make strong, clear offers of support and get on their calendar. Don't tell yourself, "They have a lot to do so I'd better not bother them," or "I don't want to look like I'm sucking up to them." Act with a mindset of being in service to the new leader. Engage them with a presumption of goodwill.

4. Provide good data and objective views.

A new CEO or leader is trying to get the lay of the land as quickly as possible. For this person to have solid numbers and thorough, objective assessment on the organization is invaluable. Your educated insight accelerates their depth of understanding about the issues and agenda and is a key step in helping build trust in you. Presenting information on a factual basis can be a tremendous help in eliminating the perception of small 'p' politics with a new leader.

5. Guard against the "This is how we do things here" mindset.

While the new CEO will need your help in learning the organization's culture and customs, they won't want to be told they need to adhere to traditions that may impede addressing changes that may be necessary. They'll want to size things up for themselves and decide which practices to start, stop, continue or modify. You never want to put yourself in a position to defend a historical practice on the basis of it being a historical practice.

6. Cut the new leader some slack.

The CEO will be under a microscope while they are learning. Manage your expectations and accept that they may make a few missteps. Don't judge prematurely or too harshly. Provide leadership to coach others whose critical reactions to a leader may be largely fear-based and self-protecting – the spread of unnecessarily critical narratives can be damaging to all involved.

7. Help them understand the rules of the road.

Most organizations have a list of what is owned by the CEO—and about which issues the leadership team or the board need to be informed. Let the new leader know which items are team matters and which items are board matters, to avoid confusion and mistakes.

8. Do your job!

Nothing puts a new executive at ease like knowing that everyone around them is high-functioning and getting things done. And remember, it's the job of senior leaders to adapt to the new leader, not the opposite. Take ownership for adapting as it is part of you doing your job.

An Added Boost from the Board

Much of the advice above applies to board members who will be critical in onboarding a new CEO or executive. A few additional notes for board members include:

9. Hire a professional coach or onboarding specialist.

A wise step with investing in your leader and mitigating the inherent, associated risks in transitions is to bring in a psychologist who is an experienced coach to shepherd the CEO's onboarding. Professional onboarding is often supported by psychometric leadership assessments which pinpoint areas of need, strengths and potential challenges in starting a new role. In addition, having an unbiased third party with whom the new leader can discuss successes and challenges can enhance onboarding.

10. Set meaningful, clear goals.

Some boards are better at this than others. Partnering with a leader in goal-setting is a process that helps establish strong, candid dialogue between the board and CEO. Further, recognize that the crispness and comprehensiveness of goal-setting will serve as the foundation for the new leader's eventual performance evaluation. If your goals are not clear and aligned, performance reviews will not be clear and aligned.

11. Agree on the pace of change and identify political sensitivities.

Most CEOs are expected to be change agents. Not everything needs to happen at once, however, and board members can calibrate their expectations and timing to those of the new hire. Unfortunately, a majority of CEOs report their boards were not engaged enough in onboarding and providing them with important historical context and a perspective on sensitive issues.

12. Know the tendencies of the new leader and what support is needed.

As mentioned before, psychometric leadership assessments can provide ample guidance for the type of support a new CEO will need. Before there are any bumps in the road, and there will be bumps, having dialogue at the start of their tenure about goals and the tendencies of the CEO allows the CEO to say to board leadership, “Here’s what I might need you to watch for.” And it allows the board to ask, “How can we best help?” Executive coaching is one tried-and-true means of giving a CEO support in the early days of their tenure.

13. Stand behind the CEO when things get tough in the early going.

It’s important for the board to show courage and actively support the new CEO when dug-in, resistant stakeholders complain about changes taking place. The board can stop the snowballing of criticism by demonstrating support for a new leader and offering constructive suggestions. In contrast, being passive and ducking and covering is a show of non-support.

14. Provide ongoing development for the board and CEO.

The board owes it to the organization to be on a cycle of self-evaluation and development, as much as they are responsible for the CEO’s annual review and/or 360. That way, all parties get to grow together for the betterment of the organization.

CEO turnover is increasing and, depending on which data you access, up to 50 percent of new CEOs will not last beyond a few years. In fact, in some organizations, difficulties with board interactions is the number one reason for chief executives not completing their contract. Onboarding is one clear solution—and the success of an onboarding program relies significantly upon the new CEO’s leadership team colleagues as well as the board of directors. Work your plan. Manage fears. Lean in.

Paul Bohne is a managing partner and leader of WittKieffer’s Healthcare Practice.